

Session 8: Module 5 - Missed Appointment Follow-Up	
SCRIPT	
Description	Text
1. Introduction	Welcome to M-SPIRIT Session 8, Module 5 , of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
2. Start	Missed Appointment Follow-up
3. <miss>	There is one more function associated with appointments that we are going to review in this module:
	Missed Appointment Follow-up.
	It is only available via the Activities menu in the Participant List screen.
	Click on the Activities menu.
4. <miss1>	On a side note, we will not be reviewing the Reschedule Block of Appointments function in Session 8.
	It allows us to move multiple appointments between clinics and to a future date and is a function more appropriate to staff who build the clinic calendar.
	That said, go ahead and select Missed Appointments Follow-up.
5. <miss2>	<no script>
6. <miss3>	This window allows us to identify participants who have missed their appointments during a specified time frame.
	It is limited to the clinic we are currently working in, which is now the Riverstone clinic.
	First, we need to define an Appointment Date Range so click on the From drop-down.
7. <miss4>	Both the From and To dates must be a date less than or equal to the current date, which is 12/8.
	Let's click on the 1st.
8. <miss5>	Click on the To drop-down...
9. <miss6>	...and click the Today button.
10. <miss7>	If we wanted to, we could change the sort order, which is by missed appointment date, from ascending to descending.
	However, ascending (the default) is fine.
	We must select at least one WIC Category before applying our criteria.
	Let's select Child...
11. <miss8>	...and click the Apply Criteria button.

12. <miss9>	We could have selected all of the WIC categories if we had wanted to.
	However, let's just add Non-Breastfeeding and see if our results change at all.
13. <miss10>	Click the Apply Criteria button again.
14. <miss11>	The grid displays all appointments not marked as Kept that were scheduled during our specified time frame and that match the WIC categories we selected.
	It includes the Appointment Date, State WIC ID, participant name, WIC category and Appointment Type.
	Let's see what else it displays by clicking on the area to the right of the scroll bar.
15. <miss12>	The other half of the grid displays the Follow-up Complete, Follow-up Date and Follow-up Comments columns...
	...which correlate with the Follow-up function we are going to review in a few minutes.
	So let's take a look at the buttons on this screen.
	Click the Print button.
16. <miss13>	For the Missed Appointment Follow-up Report, we have three display options:
	Display on Screen (the default), Sent to Printer or Save as PDF.
	Let's just display the report on the screen. Click OK.
17. <miss14>	The report essentially displays the same information, except it also includes household ID, the address and the telephone number.
18. <miss15>	When we display the report on the screen, we still have the option to send it to the printer by clicking the Print button.
	Click the Close button.
19. <miss16>	Click the Follow-up button.
20. <miss17>	The Follow-up Information window is very similar to the Confirm window we saw in the last module.
	It provides the participant's address and telephone number so that we can follow-up with the participants if we need or want to.
	Once we've followed up, we can indicate this by selecting the Follow-up Completed checkbox.
	Go ahead and click the checkbox.
21. <miss18>	Once it's selected, the Follow-up Date field is enabled and required.
	Click the drop-down.
22. <miss19>	Click the Today button.

23. <miss20>	A comment is not required but can be entered if desired.
	Click inside the text box and we'll quickly type a comment.
24. <miss21>	<pause for typing>
	This time, let's click the Print Notice checkbox since it prints something different.
25. <miss22>	Once the Print Notice checkbox is selected, the Participant and Household radio buttons become enabled.
	If there is more than one member of the same household listed in the Missed Appointments Follow-up screen...
	...and the Household radio button is selected, a letter will print for each of the household members.
	Since both Willow and Woody Tree were listed, let's select Household and see what happens.
26. <miss23>	Click OK.
27. <miss24>	This is the same screen we've seen numerous times. Click OK.
28. <miss25>	The missed appointment notice is pretty brief.
29. <miss26>	Since we selected Household and both Willow and Woody are from the same household, a letter automatically printed for each of them.
30. <miss27>	Next, click the View Comments button.
31. <miss28>	The View Comments window allows us to view the entirety of any comment created in the Follow-up window.
	However, the comment also displays in both the Missd Appointments Follow-up grid and in the Appointments tab...
	...both of which have a viewable limit of only 30 to 35 characters.
	Click the Close button.
32. <miss29>	Let's click to the right of the scroll bar to view the Follow-up information we saved.
33. <miss30>	The checkmark is inserted along with the date and up to 35 characters of the comment.
	Let's take a look at the Appointments tab where this information also displays.
34. <miss31>	We are in Woody's participant folder...
35. <miss32>	...where it appears that he doesn't have any appointment information.
	Remember, though, that we need to click the View All button to be able to see any appointments scheduled in the past.
	Go ahead and click the button.
36. <miss33>	The follow-up information is displayed on the right side of the grid.
	Click to the right of the scroll bar.

37. <miss34>	The date of the Follow-up along with the Follow-up Comment display.
	The Missed checkbox indicates that the Missed Appointment Follow-up Letter was printed.
	However, notice that only Woody's record shows the Missed indicator even though we printed letters for the household.
	When printing for the household, only the member for whom the follow-up was completed displays the Missed indicator.
38. Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Questions forum on the Montana WIC website.